

Strategy Development Guide

Guidance Document

This document was developed to help outline the strategic planning process for a systems change initiative. It includes an accompanying workbook available [here](#). As you work through this activity, consider the following:

- Leverage relationships in your communities. Who can help move the strategies forward?
- Design with co-investment in mind.
- Be realistic with the amount of work and your own capacity.

Start with the Structuring-Observing Tab

1. Start with the system. Identify the overall problem within the system and goal. (Column A-B)
 - a. What is the system you are trying to change?
 - b. Within the system you are trying to change, what is the specific problem you are trying to solve?
 - c. What is your goal?
2. Consider root causes/ systems and structures that need to change. (Column C)
3. Identify your core target population and key indicators. (Column D-E)
 - a. Who is the target population for this system, and at what scale? Who and how many will benefit, and how will that contribute to advancing workforce equity according to your definition?
 - b. Which indicator(s) in your report would signal that you are making progress towards your goal?
 - i. Which datapoints will be your baseline and evidence? What are the benchmarks you want to set?
 - ii. Reflect on the drivers of inequities of these indicators.
 - c. Consider starting by selecting just the top three or four important metrics consistent with your goal.
4. Assess the feasibility and scale of impact of this work. (Column F)
 - a. Should you move forward with this work? Should you adapt it based on available resources, local funder interests, etc.? List what you have and determine if it is enough to carry on or if you need to adapt.
 - i. Consider your collaborative's focus and priorities, local funder interests, existing political environment/political will, policy barriers, costs, and the scale of potential impact.
 - b. If you need to adapt, review the earlier parts of the workbook. (Column A-E)

Move to the Thinking-Acting Tab

1. Using this information and data from the “Structuring-Observing” tab, brainstorm specific objectives that would help you resolve the identified problem. (Column A-E)
 - a. **Stakeholders:** Who do you need to act on this strategy? Think broadly about sectors but also specifically about the organizations/people, if any, who might be ready/first to engage.
 - b. **Barriers:** What will prevent you from succeeding? Are there state or local policies in place that would restrict the impact of this strategy? Is your coalition ready to act or do you need a longer timeline for relationship and coalition building?
 - c. **Costs:** What resources, financial or otherwise, will be required to activate this strategy? What resources are already available that could be directed toward this effort?
 - d. **Existing Work:** Who else is working on this challenge? Does this strategy build on existing programs/ campaigns/ other work in the region?
2. Next, think about specific high-level activities for each objective that would help you advance your objectives. (Column F)
3. Develop a time frame for each objective. Identify where dates are flexible. (Column G)
 - a. How long would take to see results? Do you need to plan for a pilot program, additional research, etc.?
4. Tracking Progress: Outline broadly the action steps required to move this strategy forward. How will you track progress along the way, and at what points in time? (Column H)
5. Finally, consider what TA support may be needed to advance this strategy. Be exhaustive in your considerations. While the National Fund can only provide limited support, you may discover areas for partnership or collaboration with other organizations.

Moving to Implementation

An aspiration alone is not a strategy, and a strategy alone is not a plan. A plan is comprised of actions, assignments, and timelines. Plans are actionable, and ask (or answer): what, how, who, and when.

- While this workbook is mean to remain a strategy plan, consider adding a RACI matrix for implementation.